



Texmac

Here's how one distributor has used Selltis to link its sales and service departments and uncover new sales opportunities. Texmac also relies on Selltis to connect its remote salesforce, scattered throughout North America.

Why Selltis?

Selltis was built as an industrial market team-selling solution to share and leverage data from across your company: inside sales, outside sales, customer service, management, business partners and more. Selltis has more than 15 years serving the industrial market.

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Texmac's commercial embroidery machines division wanted to bridge two critical areas of its business: sales and service. It also needed to better connect its remote work force, spread throughout North America. The distributor of Happy Embroidery Machines looked to customer relationship management (CRM) technology to do both, and considered 20 to 30 options before selecting Selltis in 2008.

Texmac chose Selltis because it could customize it down to the user level. "I needed more out of the CRM package than most of the competitors were offering," Division Manager Scott Cody said. "The ability to really make it usable for our needs was the reason we selected it."

Selltis has since become the backbone of Texmac's business, managing all workflow outside of accounting. Selltis's principal use is to manage leads, opportunities and quotes, as well as connect the sales and service organizations in the business.

"Companies have two incredibly valuable assets inside of their company that they need to take advantage of," Cody said. "The first one is information and the second one is personnel. If you can find a way to make them work together then you can be far more effective. I have all of my information in an easily accessible format that everyone can access, and I have all of our personnel communicating and working in and out of the same system rather than operating independently all over the country."

"Selltis allows us to understand the customer's profile and what they might be interested in buying. It gives us the ability to do more than make a one-time sale."

Bridging Sales and Service

Texmac uses Selltis as its primary service management tool, including scheduling and documenting service, serial number and warranty histories. "That was one of the things that we wanted to do that we couldn't do with other CRM packages," Cody said. "They would offer sales functionality, but they would not give us the ability to manage our service department at the same time in the same system."

As part of a team-selling approach, Selltis helps Texmac share and leverage data each time a serviceperson or salesperson interacts with a customer.

For example, when a salesperson reaches out to a customer, he can review the last conversation the company had with the customer, including the product discussed, any service issues and whether those issues were solved satisfactorily. After all, with its large customer base – and more than 10,000 serial numbers in the system – the distributor knew it would be nearly impossible for an individual sales or serviceperson to remember a customer's history without that ongoing documentation. "To have notes tied to a customer is key to being able to present a good face to the customer," Cody said.

Connecting a Remote Workforce

Before adopting Selltis, Texmac's remote team, distributed throughout North America, wasn't sharing customer data. Now, with Selltis, "being able to have a central point lets everybody take advantage of the information," Cody said. "It's going from everyone operating independently to everyone operating as a group, and there is a lot of benefit in operating as a group. Together you multiply your workforce. You can use a smaller group of people to accomplish a lot more if everybody is working collectively."

Connecting its remote workforce with Selltis has another benefit: Sales managers have better visibility into the company's sales process and the opportunities in the pipeline.

The company generates several thousand leads each year from a form on its website, and all leads go automatically into Selltis. A lead becomes an opportunity, and Cody assigns the opportunity to a salesperson. It then appears in that salesperson's Selltis account. A salesperson then adds information based on customer follow-up, providing the distributor better data for forecasting.

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This is especially helpful because of the variance in sales cycles in the distributor's customer base. The company serves customers that range from small mom-and-pop shops to large factories with millions of dollars' worth of machinery. "Selltis is flexible in the fact that it doesn't care what the sales cycle is," Cody said. "Anytime an opportunity comes in we can establish a cycle for it and say we think this is two weeks out or this is 12 months out."

Valuable Customer History

And when those opportunities turn into quotes, Selltis provides Texmac with another level of checks and balances. "Your manager can look through them quickly for approval and then out to the customers they go," Cody said.

Those quotes are then tied to the customer after a deal is won, becoming part of that customer's permanent record in Selltis. Texmac then knows which serial number was purchased, and service can easily access the information it needs to do its job. The distributor also tracks the accessories purchased with the machinery, which allows for quick and easy re-orders if a customer says he wants what was ordered last time.

Having the customer's full history in one location also provides upsell or cross-sell opportunities. "We will go back and look at everybody that bought 12 to 24 months ago and reach out to them to see if they're ready for additional equipment," Cody said. "Or the service department will contact everybody that bought in the last 24 months and ask can we schedule service for you, which generates service income for us." The company's accessory division may also reach out to offer consumable items for the previously purchased machinery.

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Learn more about how Selltis can help your company: [985-727-3455](tel:985-727-3455)

For more on how CRM can help your business, read our blog: blog.selltis.com